

♦ MasterCast

Conducting Virtual Video Research

Medallia

COVID-19 has changed the face of Market Research

But companies need to find a way to understand consumer needs more than ever



NO Focus Groups



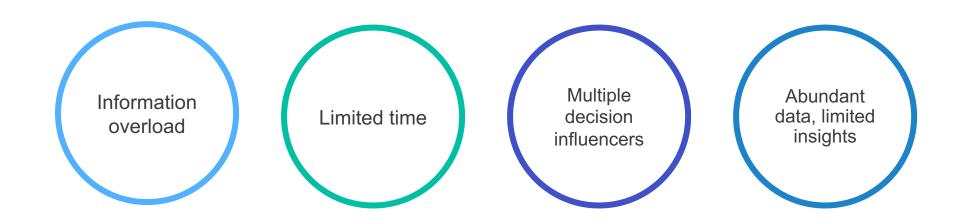
NO Ethnography



NO In-depth Interviews



Driving organizational change is hard







Today's lesson about asking the right question to get meaningful data, brought to you by a 4 year old:

Me: Should I put a banana in your lunch today?

Him: Sure! They are healthy & I'm supposed to bring

healthy food.

Me: Will you eat it?

Him: Definitely not. I don't like bananas.

11:19 AM · Feb 3, 2018 · Twitter Web App

8.5K Retweets 29.4K Likes





Big data has done wonders for the industry but has 'dehumanized' the data. We need to 'feel the consumers' rather than read about them.

VIJAY RAJ, VP CMI UNILEVER



Don't fear the mess!

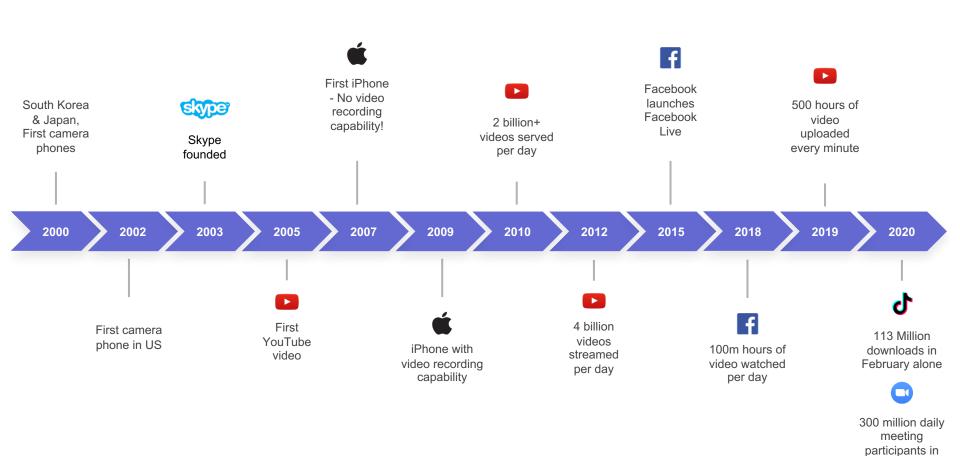
A clean baby is just a Pampers wipe away

#PampersPooface





Empathetic Easy to digest **Authentic** connection **Captures Break Engage** imagination through emotions



April

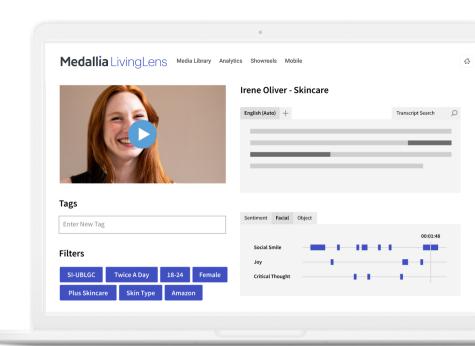
Medallia

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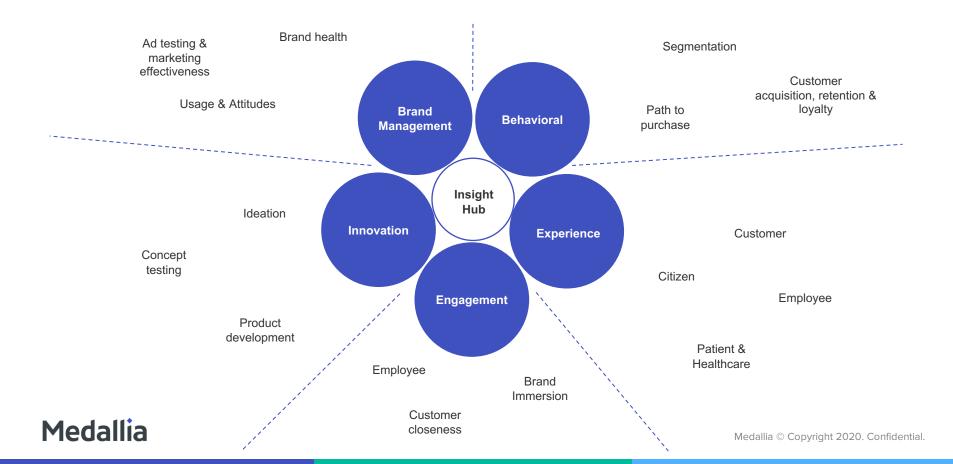
MEDALLIA LIVINGLENS

Create a human connection to customer feedback

- Increase the depth of feedback by providing the option to submit video, images or audio insurvey.
- Uncover meaningful insights from the spoken word, facial expressions and emotion, as well as objects included in videos or images.
- Easily find and share content with employees and executives to drive customer empathy.



Adding value in a wide range of use cases



Video stories have immediate business impact

Give the **customer** a face

Break down denial about what data reveals

Generate executive buy-in and support

Inspire employees

Embrace the **power of storytelling**





Remote Research

Usual Normal



THERESA MARWAH | RESEARCH TECH LEAD | @ATLASSIAN

Agenda

Context setting

Super powers

Our story

Lessons learned

THE LONG AND WINDING ROAD...

Chicago Booth
VC incubator
PWC

MY TEAM
United

Robert Half ······ Atlassian ····· ✓

Building and sharing deep understanding digitally.

Virtual life @atlassian

- **₹** Jira
- **X** Confluence
 - Trello
 - Bitbucket

Collaboration Software

Digital first



Global
Teams & Customers



Invested
Strategic Partners since
2018

OUR MISSION

We believe behind every great human achievement, there is a team. Our mission is to unleash the potential of every team.





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super powers of remote moderated research



Great communicators don't just hear the words. Great communicators hear the meaning behind the words.

SIMON SINEK



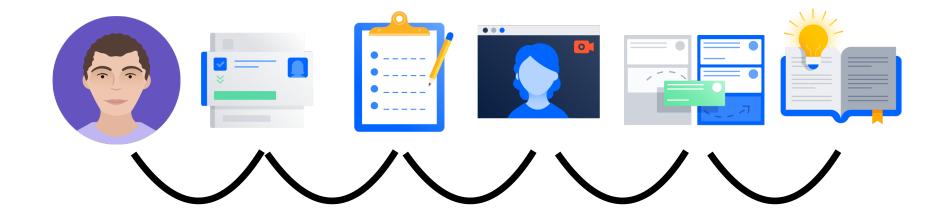
BUSY WORK

Logistics Planning
Transcription
File Management
Taxonomy
Reference Searching
Deletion Requests

PRODUCTIVE WORK

Targeting Screening Listening **Synthesizing Analyzing** Reporting **Sharing**

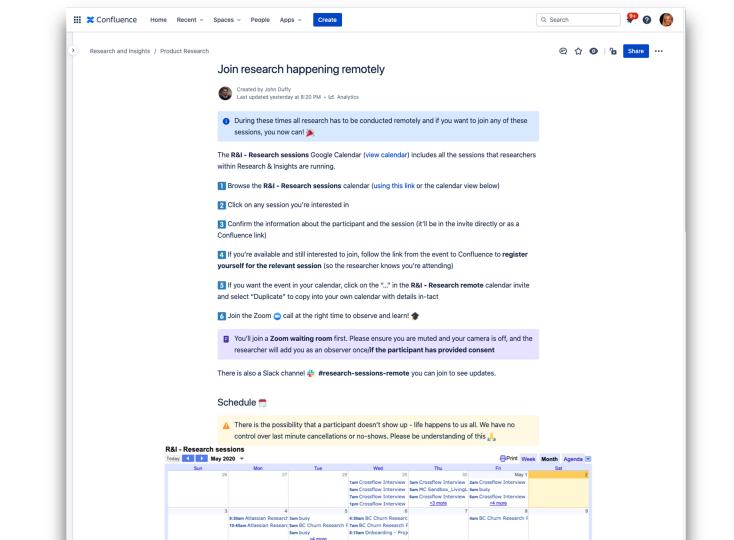
Don't waste brilliant minds with monotony



Recreate

Re-use

Respect



5 Super Powers of Remote Moderated Research



The Why
Context, Intention,
Needs, Meaning



Right People Balanced and targeted panels



Effective
Brilliant minds
on the right
activities



Data
Management
Recreate, Re-use,
Respect



Scale Empathy
Research as a
team sport,
Exposure hours

Agenda

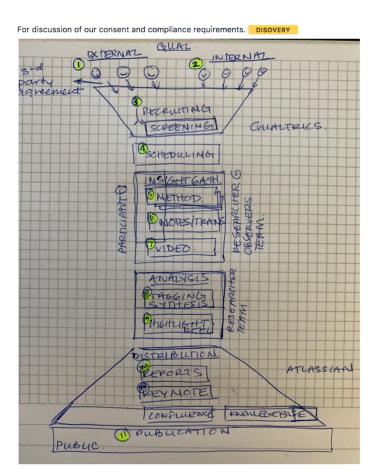
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DESIGN: QUAL RESEARCH JOURNEY: INPUTS, GENERATION, OUTPUTS



Recruit

- 1. Recruit participants from 3rd party vendors
- 2. Recruit participants from Atlassian tools and products
- 3. Screening surveys are completed by participants to confirm eligibility for research study (optional)
- 4. Scheduling for participant to select time slot and get reminders for research

Engage

- 5. Engage in the appropriate method (Research Methods Inventory)
- 6. Generate transcripts and notes from the research (user generated and Atlassian generated content)
- 7. Generate video from research (participant image, PII)
- 7.5. Generate data from research

Analyze

- 8. Tagging text, groupings of text, highlights of text
- 9. Tagging video, slicing of video, highlights of video

Distribute

- 10. Internal: highlight reel, reports, dashboards, keynote, confluence, knowledge base
- 11. Public: tbd

Here is a great example of distributed research that includes anonymized quotes, and video highlights:Findings: Task-based walk-throughs with Jira users using a Chrome Extension



ENABLE: DIGITAL SOLUTIONS TO ENABLE REMOTE PARTICIPANTS



*fine print▲ ATLASSIAN

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- 3. Disclosure of Propietary Information. Any Propietary Information related to the Research is extremely confidental. As such, you shall: a) hold Propietary Information in strict confidence and take reasonable precautions to protect such Propietary Information (including, without limitation, all precautions you employ with respect to your own confidential materials); and (b) not divulge any Proprietary Information to any third party.
- 4. Consent to Collection of Recordings and Device Information. You agree that Atlassian may collect video recordings or photographs of your face, audio recordings of your voice, and may access the device on which you are conducting Research to capture recordings of your voice, and may access the device on which device information during Research to capture recordings of your actions and/or Recordings!"). See Recordings!". See Recordings!

- Atlassian Privacy Policy available at https://www.atlassian.com/legal/privacy-policy, as may be updated from time to time (with the Research considered an "Atlassian Service" under the Privacy Policy).
- 5. Ownership and Use of Research Data and Feedback. You acknowledge and agree that Atlassian shall own all right, title and interest in and to all results of your Research, including all Session Recordings, Device Information, conclusions, suggestions, and feedback comments made by you or in connection with your Research under this Agreement ("Research Data"). You hereby make all assignments necessary to accomplish the foreepoing.
- 6. Term; Confidentiality Period. This Agreement shall continue in effect until terminated by Atlassian upon written notice to You. Your obligations with respect to Proprietary Information under this Agreement expire five (5) years from the date of receipt of the Proprietary Information (except that with respect to any trade secrets the obligations shall be perpetual). These obligations shall survive any termination or expiration of this Agreement.
- 7. Exclusions. This Agreement imposes no obligations with respect to information which: (a) was in your possession before receipt from information which. (a) was in your possession before receipt from 4 talsasian, (b) is or becomes a matter of public howelveige through no fault of you, (c) was rightfully disclosed to you by a third party without restriction on disclosure or (d) is developed by you without use of the Proprietary Information and such independent development can be shown by documentary evidence. You may make disclosures required by court order provided you used illigent efforts to limit disclosure and to obtain confidential treatment or a protective order and have allowed Allassian to participate in the proceeding.
- 9. Return or Destruction of Proprietary Information. Upon termination of this Agreement or written request by Atlassian, you shalt: (a) cease using the Proprietary Information, (b) return or destroy the Proprietary Information and all copies, notes or extracts thereof to Atlassian within seven (7) business days of receipt of request, and (c) upon request of Atlassian, confirm in writing that you have compiled with these obligations.
- 10. Disclaimer. You acknowledge and agree that the Research and any Proprietary Information offered in connection therewith (including, but not limited to software and content) is provided "AS IS" and WITH ALL FAULTS. TO THE MAXIMILIA STYRET PERMITTED BY ADPLICABLE I AND

COLLABORATIVE

A ATLASSIAN

G'day from Atlassian!

This form includes information about what is and is not shared in the research session, and additional details about your participation.

About Atlassian. We're Atlassian; we make collaboration, development, and issue tracking software that helps teams of all types do the their best work. Atlassian, on behalf of itself and its subsidiaries and affiliates, ("Atlassian," "We" or "Us") is always looking for ways to make our services smarter, faster, and more useful for you, so we occasionally conduct research where participants are asked to provide insights or feedback ("Research").

Your participation. As the participant named below ("You" or "Your") understand that Your participation is completely voluntary. This means that you do not have to participate in the research if you do not want to. For any reason and at any time during the Research, You can request a break or choose to stop participating. Atlassian can also end the Research session at any time.

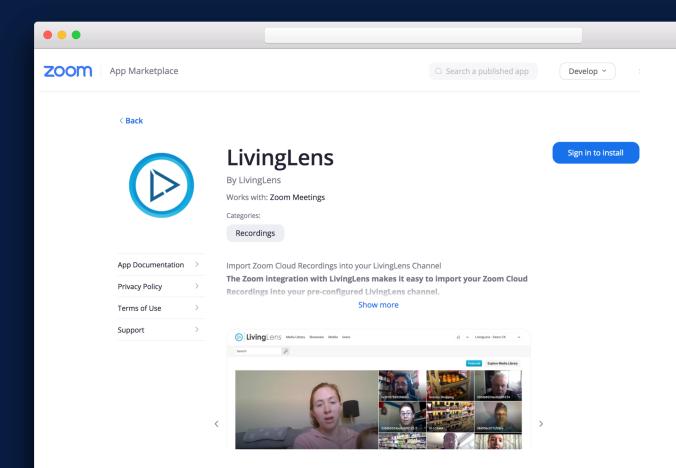
ession. You will be asked to provide feedback, such By checking the box(es) below, You agree that Atlassian may use Your Likeness in connection with its Research and in using and creating the Research Recordings. rmation (collectively, "Feedback"). We want to learn It is okay for Atlassian to: re no right or wrong answers to the questions we Record audio You refrain from sharing information that may be Record video any time, You can say "no comment" or "I'd rather Take screenshots of your computer screen Have observers join the session By signing below. You agree that You have read and understand this agreement and that ▼ Take notes about our session You have the right to enter into this agreement. take audio/video recording **A** ATLASSIAN Recordin performa compute Thank you Theresa for your participantion in Atlassian Research! behind you A copy of this agreement will be emailed to you.

AUTOMATE: FREE THE MINDS

APIAutomate data handling

Partnerships

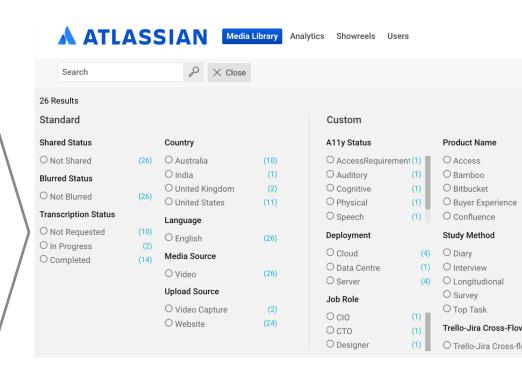
Chose vendors who want to grow with you



STANDARDIZE TO REUSE: MAKE IT EASY TO FIND VALUE

The results matrix o

	Import Meta Data	Universal Filter D	Not Needed	
Product Name	9	8	1	
Deployment Type	5	12	1	
Researcher Name	11	6	1	
Study Method	4	11	3	
Date	12	2	4	
Participant ID	16	2		
Location	3	4	11	
License Type	1	9	8	
Product Version	1	10	7	
Research Audience	2	7	9	
Consent Level	4	12	2	
Participant Job Role	4	14		
Participant User Status	1	12	5	
Participant Geo	2	7	9	
Participant journey stage		10	8	
Participant CSAT		6	12	
Participant Support Status		2	16	
Participant A11Y Status	3	10	5	



OUR REMOTE RECORDING PRACTICE TODAY

Invite	Manage Participants	Inform Consent	Record	Capture & De-identify	Admit Observers
	Rename Admit			0	` <u>.</u>
1. Universal Zoom Link 2. Information Message 3. PDF Consent Agreement	1. Waiting Room 2. Anonymize Observers 3. Mute Observers 4. Admit Participant	1. Link to Digital Consent 2. Practice Q&A 3. Gain Consent Options 4. Digitally Sign Agreement	1. Record	Read Conformation Page Participant ID in Recording Participant ID link to PII	1. Admit
Zoom 8 Recruitment Platforms	Zoom	Zoom Digital Agreement	Zoom	Zoom Participant #ID	Zoom

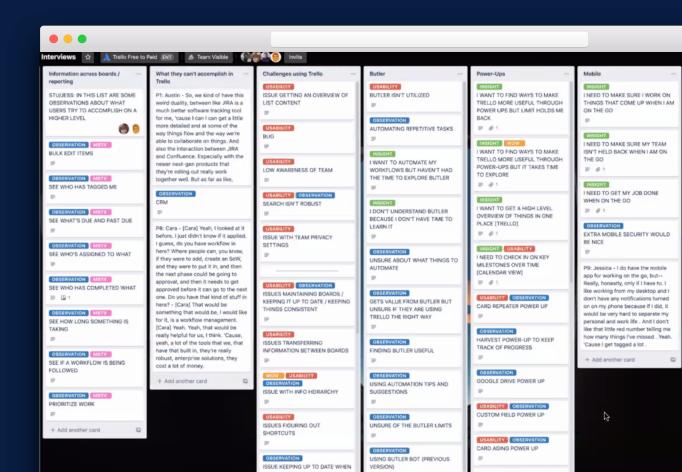
TRANSCRIPTS CONVERTED TO CARDS

Trello

Ingesting transcript blocks into cards

Theming as a remote team

Tagging and theming in digital board



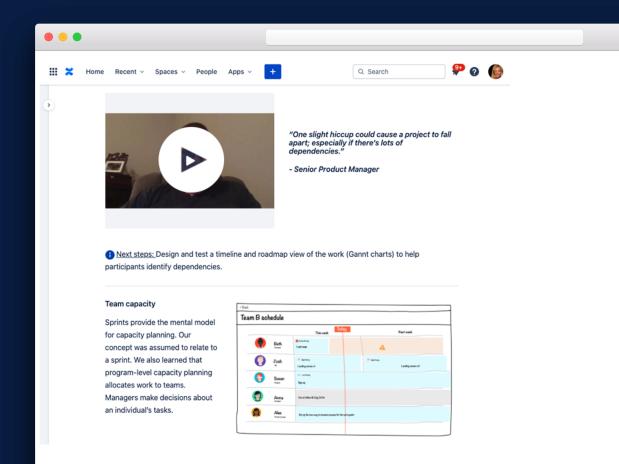
VOICE AND VIDEO IN OUR REPORTS

Confluence & Slides

Research reports are multimedia

Embedded Video

Sharing customers own words and voices



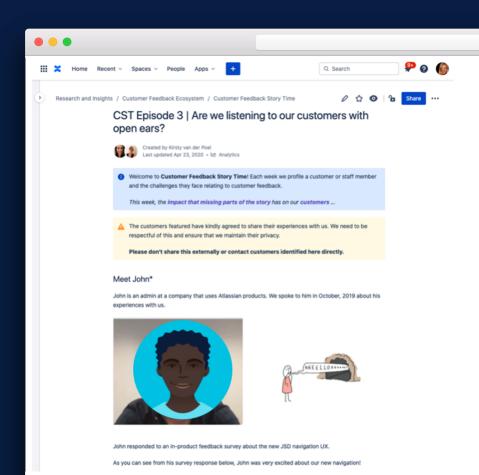
STORY TIMES

Key Themes

Story times is a weekly series raising awareness of a key initiative

Customer Voice

Embedded video of poignant customer stories are compelling



VIDEO SHARE-BACKS

Async

Global Audience when available

No cherrypicking **Context with clips**

Repeatable

Craft the critical message with powerful words. repeat. repeat. repeat.





Methodologies using Remote Video



Diary studies
Longitudinal buyer
journey
Migration journey



Cognitive Testing Top Tasks Surveys



Discovery Interviews Remote Moderated



Benchmarking Moderated task completes



Survey Response Ask & Record Answer

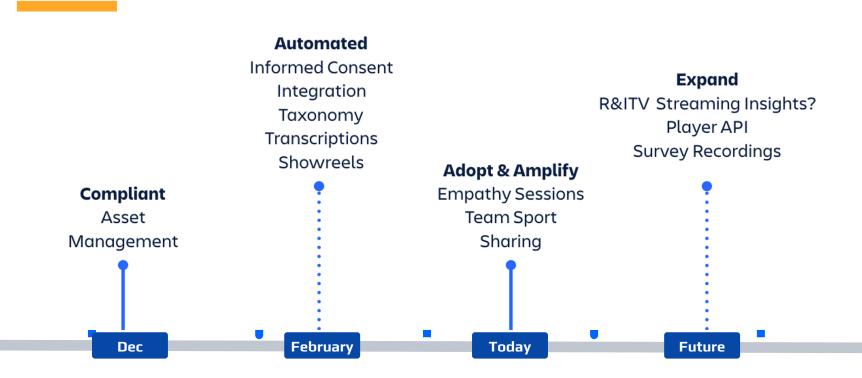


Prototype Testing
Moderated and
Unmoderated



UX validation
Moderated and
Unmoderated

RESEARCH VIDEO MILESTONES



Agenda

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Lessons learned

Lay foundations that promote future growth





It takes a team